



MUNICIPAL BUDGET AND FINANCE ANALYST I / II / III+

Purpose:

To actively support and uphold the City's stated mission and values. To perform a variety of professional level administrative and analytical work involving the preparation, study and application of City budgets and finances; and to perform duties involved in the research, analysis and development of efficient systems.

Supervision Received and Exercised:

Municipal Budget and Finance Analyst I

Receives general supervision from the Financial Services Manager - Budget and the Municipal Budget and Finance Analyst Level III

Municipal Budget and Finance Analyst II

Receives general supervision from the Financial Services Manager - Budget and the Municipal Budget and Finance Analyst III.

Municipal Budget and Finance Analyst III

Receives general supervision from the Financial Services Manager – Budget. May provide direct supervision or functional and technical direction over professional staff.

Distinguishing Characteristic:

Municipal Budget and Finance Analyst I

This is the entry level class in the Municipal Budget and Finance Analyst series. This class is distinguished from the Municipal Budget and Finance Analyst II / III by the performance of the more routine administrative and analytical duties assigned to positions within the series including assisting in the city budget preparation and administration; conducting fiscal impact analyses; revenue and expenditure forecasting; and conducting administrative and systems studies. Since this class is typically used as a training class, employees may have only limited directly related work experience.

Municipal Budget and Finance Analyst II

This is the journey level class within the Municipal Budget and Finance Analyst series. Employees within this class are distinguished from the Municipal Budget and Finance Analyst by the performance of the full range of duties as assigned including conducting in-depth administrative and systems studies; financial analysis; developing and performing independent statistical and research studies; preparing comprehensive multiyear financial econometric models and plans along with economic impact studies; and developing and assisting in the implementation of goals and objectives for the Municipal Budget and Finance Division. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise, and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the lower class of Municipal Budget and Finance Analyst, or, when filled from the outside, require prior budget and finance experience, preferably in a public agency. Appointment to the higher class requires that the employee be performing the full range of duties assigned to the class.

Municipal Budget and Finance Analyst III

The fundamental reason this class exists is to perform advanced professional fiscal analysis and research duties in support of the preparation and administration of citywide capital and operating budgets. Under the direction of the Finance Services Manager – Budget or other supervisor, performance is evaluated based upon results obtained. Work is more complex than the work of a Municipal Budget and Finance Analyst II, and requires more independent judgment and leadership based upon a broader background of experience. The Municipal Budget and Finance Analyst III also may supervise employees who are currently in either the entry or journey level classes.

Essential Functions:

Duties may include, but are not limited to, the following:

- Participate in annual operating, capital and city budget preparation and administration; conduct fiscal / economic impact studies and cost / benefit analyses; coordinate the preparation of manuals and comprehensive and timely budget documents.
- Perform comprehensive multiyear econometric models and scenarios; financial projections and plans involving revenue and expenditure forecast analysis.
- Research economic trends at national, regional, state and local levels.

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Municipal Budget and Finance Analyst I / II / III+ (continued)

- Assist in developing city financial policies.
- Conduct city-wide base budget hearings; monitor city-wide departmental patterns; prepare and distribute budget reviews.
- Advise management, departments, and divisions on budget problems, policies, and procedures and assist them in the maintenance of proper budgetary controls.
- Assist with the preparation and administration of the city's capital improvement program, debt management plan, and annual financial reports; assist department and division heads in developing and improving operational objectives.
- Conduct administrative and systems studies; evaluate, and prepare reports and recommendations for improving policies, procedures, methods, and systems of operation.
- Conduct performance measurement / benchmarking and productivity studies; review performance and program direction; evaluate and recommend changes to improve productivity.
- Design and conduct surveys; economic impact studies; utility rate reviews; and prepare proposals on financial and staffing requirements; design, develop and perform various independent statistical and research studies to monitor economic processes affecting the budget.
- Present financial analysis to council committees; present policy analysis or other financial feasibility studies to senior management, council committees, and policy makers.
- Establish short and long range planning goals and objectives for, and coordinate special projects assigned to the Budget and Finance section.
- Perform the costing of Police and Fire MOU agreements; generate the Quarterly Revenue Report; and provide financial analysis on upcoming legislative issues that may impact city revenues.
- Perform related duties as assigned.

Duties specific to Municipal Budget and Finance Analyst III+:

Effective November 1988

Reviewed October 1993

Revised December 2000

Revised February 2001

Revised Feb 2006 (job title, duties, and MQ)

Revised Oct 2015 (job title, duties and MQ)

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Municipal Budget and Finance Analyst I / II / III+ (continued)

- Participate in the selection of staff; provide functional / technical direction or may directly supervise assigned staff; and as needed, work with staff to correct deficiencies and/or implement discipline procedures.
- Provide pro-active performance planning through ePerformance; utilize the ePlan to formalize performance goals, outline professional development plans, and discuss job competencies; utilize the eLog as an electronic dialogue tool and communication resource for transparent documentation.

Minimum Qualifications:

Experience:

Municipal Budget and Finance Analyst I

One to two years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work preferably some of which is in government.

Municipal Budget and Finance Analyst II

Two to three years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work which should include at least two years of increasingly responsible budget and finance experience in government.

Municipal Budget and Finance Analyst III

Three to four years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work which should include at least three years of increasingly responsible budget and finance experience in government.

Education:

Municipal Budget and Finance Analyst I / II / III+

Requires a Bachelor's degree from an accredited college or university with major course work in accounting, finance, statistics and research, economics or a degree related to the core functions of this position.

Licenses/Certifications:

Effective November 1988
Reviewed October 1993
Revised December 2000
Revised February 2001
Revised Feb 2006 (job title, duties, and MQ)
Revised Oct 2015 (job title, duties and MQ)

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Municipal Budget and Finance Analyst I / II / III+ (continued)

None

Examples of Physical and/or Mental Activities:

- Work in stationary position for long periods of time
- Operates office equipment, such as computers, copy machine and calculators.
- Extensive reading and close vision work
- May require working extended hours
- May work alone for extended periods of time

Competencies:

<http://www.tempe.gov/home/showdocument?id=26274>

Job Code: 321/374/391

Status: Exempt / Classified